

Ask the Expert

Q: Can you please provide some guidance on how to create a compelling method to communicate our business units' achievements against our goals?

I've been approached by our senior management to create a way for our senior management team to efficiently present our achievements to our president, make it interesting and ensure he's up-to-date on all of our activities. If you have any samples of what has worked in the past that would be extremely helpful.



A: To convey each business unit's achievements against goals, I would emphasize overall results to date, upcoming milestones and issues needing attention, as I'm guessing your president will be less interested in past successes and focused more on pending activities and executional risks.

Provide clear, easy-to-digest data

To present this information, you might create a one-page scorecard that consolidates pertinent facts in an easy-to-understand format. Here's how I'd go about it:

1. Determine each business unit's key operating goals and the frequency with which to measure them.
2. Map out a process for obtaining status updates and other relevant data.
3. Assign point people from each unit who will be responsible for compiling and supplying information.
4. Decide on the structure and categories for your scorecard.
5. Create a scorecard prototype that displays each unit's progress and pressing issues.
6. Test the prototype with the scorecard's target audience and revise it based on feedback.

See Figure 1 (below) for an example of a scorecard used at a leading company (uploaded to the Hub with the company's permission).

Business Unit Scorecard

Date

Unit 1 Project A G Project B G		Unit 3 Project F Y Project G G Project H Y Project I G Project J G		Unit 4 Project K G		NOTES <ul style="list-style-type: none"> Project M is in a red status, as final decisions are overdue for the vendor announcement. Project F remains in a yellow status, as batch testing is behind schedule. Project H is in a yellow status, as new hire staffing is short of target projections.
Unit 2 Project C G Project D G Project E G		Unit 5 Project L G Project M R				
Upcoming Milestones						
Unit 1 <ul style="list-style-type: none"> Meeting with vendor – (11/28) Review session on upcoming changes – (11/30) Scoping draft complete – (11/30) Project testing complete – (11/30) Unit 2 <ul style="list-style-type: none"> Final sign off on January communication – (12/6) Vendor selection complete – (12/10) Board presentation – (12/10) Sign off on new pricing program (12/12) 		Unit 3 <ul style="list-style-type: none"> Feasibility analysis begins – (11/26) User acceptance testing complete – (12/4) Pilot test complete – (12/11) Winning bidder notified – (12/12) Sales communication distributed – (12/13) Press release issued – (12/14) 		Unit 4 <ul style="list-style-type: none"> Directional design analysis begins – (11/29) Implementation update – (12/3) Risk evaluation of key changes complete – (12/15) Unit 5 <ul style="list-style-type: none"> Communication plan complete – (12/4) Legal sign off (12/6) Go/No Go decision – (12/13) 		
Top 3 Issues or Risks						
Risk: Unit 2 – Distribution error at printer Mitigation: <ul style="list-style-type: none"> Distribution lists validated by project team Random spot checks of printed materials conducted at printer Receipts confirmed at mail hubs 		Risk: Unit 3 – Testing execution hindered by resource constraints Mitigation: <ul style="list-style-type: none"> Resources added to assist with testing execution Matrix created to schedule resource utilization Weekly meetings to discuss and address capacity issues 		Risk: Unit 5 – Data is inaccurate or not loaded correctly at vendor Mitigation: <ul style="list-style-type: none"> ABC to provide detailed validation before launch date Project team to confirm feedback file Finance audits all paper exceptions Test plan in place for post-January 1 statements 		

This scorecard is designed not only to communicate project or goal status, but more importantly to pinpoint issues and risks needing attention. Accordingly, the scorecard is future-focused.

In your scorecard if you wish to list recent accomplishments, tasks completed or other topics, you could add or substitute those categories as desired.

Code your goals

The key to making any scorecard useful is to keep it concise and graphical. A good way to do that is to code the status of each goal red, yellow or green – based on the likelihood of completing the goal by its due date.

How you define the goal's status might be based on time remaining and percent of goal complete, degree of challenge compared to allocated resources or any other variable that could affect a successful outcome.

However you define status, you will want to ensure your definitions are clear and consistent, so there is no ambiguity about the implications of being red, yellow or green.

Try to economize

Next, document key upcoming milestones or other urgent priorities with due dates. The intent here is to convey what's happening when, and to demonstrate that the project team is focused on the right activities.

Be sure to summarize each pending milestone succinctly in a common grammatical format. Economy of words is key, as you probably will be pressed for space and the reader will be expected to digest a lot of information.

End the scorecard with a section outlining top issues or risks. You don't necessarily need to include items for each business unit. Instead, you might focus on the most serious items overall. Even more important than identifying issues and risks is showing that mitigation plans are in place to address them.

Easy way to prioritize

Scorecards like these can be immensely helpful in executive briefings, enabling you to efficiently convey important information.

The right scorecard also can help you create accountability, allocate resources and improve execution of strategic priorities. It's worth exploring how scorecards might work in your organization.

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